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PERSONNEL

21 September 1954

FITNESS REPORT

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1. GENERAL

This Regulation establishes the responsibilities and procedures for the preparation of Fitness Reports, Form No. 37-189 (to be redesignated Form No. 45), which record supervisors' evaluations of staff employees and staff agents (hereinafter referred to as employees), who are assigned to headquarters, to

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2. POLICY

The Agency will continuously evaluate the abilities and performance of its employees and will ensure that they are informed concerning the effectiveness of their performance. The Fitness Report will be used to record such evaluations periodically. Although the information thus recorded must be discussed with the employee concerned in order that the employee will be informed relative to his supervisor's evaluation of his performance, it is optional whether the form itself is actually shown to him.

3. RESPONSIBILITIES

a. SUPERVISORS

- (1) Supervisors at all levels are responsible for the continuous evaluation of the abilities and performance of employees under their immediate supervision and for the preparation of Fitness Reports in accordance with the provisions of this Regulation.
- (2) The supervisor next in line of authority above the supervisor who prepares a report is responsible for reviewing the Fitness Report in order to ensure that it is completed accurately and that the immediate supervisor has neither over-evaluated nor under-evaluated the individual concerned. He will also consider whether additional action should be recommended on the basis of the Report, and advise the supervisor with respect to taking such action.

b. HEADS OF MAJOR COMPONENTS

The Deputy Directors (Plans), (Intelligence), and (Administration), the Director of Training, the Assistant Director for Communications, and the Assistant

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REGULATION

Director for Personnel are responsible for ensuring that Fitness Reports for all employees under their jurisdiction are prepared and submitted in accordance with the provisions of this Regulation.

c. THE ASSISTANT DIRECTOR FOR PERSONNEL

The Assistant Director for Personnel is responsible for administering the provisions of this Regulation, for providing assistance and guidance to supervisors at all levels, and for reviewing the overall effectiveness of this evaluation program.

4. TYPES OF FITNESS REPORTS

a. INITIAL REPORTS

A Fitness Report will be prepared for each employee nine months after his entrance on duty with the Agency. This report is of particular importance in providing a record of the supervisor's evaluation of the individual's performance and potential before he has completed the 12-month trial period. The report is required regardless of the length of time the employee has been under the jurisdiction of his current supervisor. However, the current supervisor may request advice and information regarding any point covered by the report from others who have supervised the employee during the period covered.

b. ANNUAL REPORTS

A Fitness Report will be prepared for each employee 12 months following the completion of his first nine months of service and annually thereafter, except in cases when a report has been prepared for some other purpose within 90 days preceding the due date of an annual report. A supervisor may defer preparation of an annual report until an individual has been under his jurisdiction for a maximum of 90 days when he considers it necessary in order to observe the individual's performance.

c. REASSIGNMENT REPORTS

(1) Reassignment or Departure of Supervisor

A supervisor who is to be reassigned or who is leaving the Agency will prepare Fitness Reports on employees under his immediate supervision prior to his departure. However, if the supervisor is being separated for cause, such reports will be prepared by the supervisor next higher in authority. Such reports are not required if one has been completed within 90 days or if the supervisor submits a memorandum to the Office of Personnel certifying that the last Fitness Report for the employee is adequate and current and requires no change or modification.

(2) Proposed Reassignment of Employee Between Offices

A Fitness Report will accompany Standard Form 52, Request for Personnel Action, recommending the reassignment of an employee between Offices, Senior Staffs, or Area Divisions except when a report has been prepared for some other purpose within the preceding 90 days. Such reports are not required if the supervisor submits a memorandum with the Standard Form 52 certifying that the last Fitness Report is adequate and current and requires no change or modification. The report in these cases must be considered by the requesting office prior to initiating the Standard Form 52 and will be used as a guide in considering approval of the proposed reassignment. When a memorandum has been substituted for the Fitness Report, a copy of the most recent Fitness Report will be furnished the requesting office by the Office of Personnel upon request. Except in unusual circumstances, the Office of Personnel will not consider a proposed reassignment unless such a report is of record.

(3) Reassignment of Employee Within Offices

A Fitness Report and Standard Form 52 will be prepared when an employee is reassigned within Offices, Senior Staffs, or Area Divisions except when

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a report has been prepared within the previous 90 days or when a memorandum is directed to the Office of Personnel by the employee's supervisor certifying to the adequacy and currency of the previous report. However, such report will not be required if the reassignment involves neither a change of supervisors nor a significant change in the duties of the employee.

d. SEPARATION REPORTS

A Fitness Report will be prepared to accompany Standard Form No. 52, Request for Personnel Action, for each employee leaving the Agency. The supervisor's recommendation concerning the individual's suitability for reemployment will be included in Section V, Item F of the report. In the event of the supervisor's absence, this report will be prepared by the supervisor next higher in line of authority.

e. SPECIAL REPORTS

Other Fitness Reports will be prepared, as necessary, to meet the requirements of special circumstances.

5. REPORT PROCEDURES

a. INITIATION OF REPORTS

(1) The Office of Personnel will prepare advance lists of initial and annual reports due. These lists will be prepared and distributed to appropriate Administrative or Personnel Officers in each Office, Senior Staff, or Area Division on or before the 15th day of each month. They will contain the names of those employees for whom initial or annual reports will become due during the following month.

(2) Reassignment reports and separation reports will be prepared in accordance with the provisions of this Regulation and without advance notice from the Office of Personnel. Special reports will be prepared as directed by the Office, Senior Staff, Area Division, or Career Service Board having jurisdiction over the individual concerned.

b. PREPARATION OF REPORT

The Fitness Report will be prepared in duplicate. The supervisor completing the report will transmit it to the reviewing official. After reviewing and completing the form, the reviewing official will transmit both copies to the Administrative or Personnel Officer of the Office, Senior Staff, or Area Division who will forward the original to the Office of Personnel and the copy to the Head of the Career Service Board concerned within 15 work days following the expiration of the period covered by the report. However, separation reports will accompany the Standard Form No. 52, as indicated in paragraph 4d above.

6. REPORTS OF UNSATISFACTORY PERFORMANCE

- a. At any time when it becomes apparent to a supervisor that an employee is not effective in his position and less drastic action has not improved his performance, the supervisor should inform the Office of Personnel through regular administrative channels. The Office of Personnel will assist in preparing a formal memorandum advising the employee of the specific deficiencies in his performance. (See [redacted] General Separation Actions.)
- b. When a supervisor's recognition of unsatisfactory performance is coincidental with the preparation of a Fitness Report as indicated by checks in items 6a(1) or 6d(1) of the Fitness Report, a copy of the memorandum described above will be attached to both copies of the report.
- c. If separation action based on unsatisfactory performance is proposed, it must be processed in accordance with established separation procedures.

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- d. If a memorandum indicating unsatisfactory performance is attached to an individual's Fitness Report, he will be ineligible for a periodic step-increase until a subsequent Fitness Report indicates satisfactory performance.

FOR THE DIRECTOR OF CENTRAL INTELLIGENCE:

L. K. WHITE
Deputy Director
(Administration)

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